

Request for Proposal

Property Brokerage & Consulting Services for the
Sale or Transfer of the
Clayberg Fulton County Nursing and Rehabilitation Center



Fulton County

Issue Date: May 31, 2023

I. INTRODUCTION

The County of Fulton is requesting proposals from professional institutional property advisors and brokers with experience in the marketing and sale of long-term care and rehabilitation facilities. The County will be reviewing information to select a licensed qualified Broker (individual or firm), to provide specified services related to the marketing of Clayberg Fulton County Nursing and Rehabilitation Center, including the physical property and business operation, negotiation of a sale transaction and preparation of related documents and issuance of notifications as required by law.

The Fulton County Clayberg is a 49-bed long-term care, rehabilitation facility with a secured memory care and physical therapy unit. The facility is an important community asset. The Broker chosen for this project will be required to educate, advise and perform services on behalf of the County to achieve the objectives established by the County Board for the transfer of Clayberg out of County ownership.

II. INSTRUCTIONS TO PROPOSERS

1. All proposals must be submitted to:
Cindy Simpson, Board Secretary
257 W. Lincoln
Lewistown, IL 61542
All questions regarding the proposal shall be directed in writing to the Board Secretary at the above-listed address or via email at:
csimpson@fultonco.org
All responses to this RFP must be delivered in a sealed envelope clearly labeled "RFP Property Brokerage and Consulting Services – Fulton County Clayberg Nursing and Rehabilitation Center".
2. Proposals are due by 1:30 PM (CT) on Friday, June 23, 2023. One (1) original (identify) and six (6) identical copies of all materials required of your response to this RFP must be submitted. Proposals arriving after the deadline will not be accepted.
3. Proposals shall provide a concise and accurate description of provider capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content.

4. An authorized representative of the proposer must complete and sign the proposal.
5. A public opening will be held on Thursday, June 29, 2023 at 5:30 PM in the Fulton County Board office, located at 257 W. Lincoln, Lewistown, IL 61542.
6. The County Board Secretary or designee will notify Proposers if the County selects them as a finalist. Finalists may be invited to make a public presentation before the County Board Committee meeting on July 13, 2023 at the Fulton County Board office.
7. Failure to comply with any part of the RFP may result in rejection of the proposal as non-responsive.
8. In submitting information, it is understood by the undersigned that the right is reserved by the County of Fulton to accept any submissions, to reject any and all submissions and to waive any irregularities or informalities which are in the best interest of the County of Fulton.

III. MINIMUM QUALIFICATIONS

The County of Fulton invites submissions from any person or entity meeting the following minimum qualifications: (Verification of these qualifications is attested through completion of this RFP.)

1. Licensed to market and/or sell real property in the State of Illinois.
2. Three years of experience working with public and/or not-for-profit entities.
3. Prior experience with the sale and/or transfer of long-term care or rehabilitation facilities.
4. Upon request, provide proof of insurance coverage for General Liability, Employers Liability, Workers' Compensation, and Errors and Omissions Insurance.

IV. TERMS AND CONDITIONS

1. The County reserves the right, at its sole discretion, to terminate this process at any time, or reject any and all proposals without penalty, prior to the execution of a contract acceptable to the County. Final selection

will be based on the proposal which best meets the requirements set forth in the RFP and are in the best interest of Fulton County.

2. The County reserves the right to request clarification of information submitted and to request additional information of one or more applicants.
3. Any proposal may be withdrawn by the submitter by attending the public opening in person, and requesting that their submission be excluded.
4. Any proposal not so withdrawn shall constitute an irrevocable offer, for a period of 90 days after June 23rd, 2023, to provide the County the services set forth in the attached specifications, or until one or more of the proposals have been approved by the County, whichever occurs first.
5. Any agreement or contracts resulting from the acceptance of a proposal shall be on forms either supplied or approved by and the County shall contain, at a minimum, all applicable provisions of the RFP. The County reserves the right to reject any agreement that does not conform to the RFP and any County requirements for agreements and contracts.
6. The County shall not be responsible for any costs incurred by the firm in preparing, submitting or presenting its response to the request for qualifications.
7. The successful proposer will be required to provide evidence of insurance for General Liability, Employers Liability and Errors and Omissions Insurance. The firm will also be required to provide workers' compensation insurance in accordance with Illinois State Law.
8. This invitation to submit a response to the Request for Proposal is not an authorization to solicit sales offers on behalf of the County. The County specifically directs that no contact or solicitation of sales proposals or bids be made on behalf of the County until notification of the successful proposer is made. Failure to comply with this condition will be grounds for disqualification.

V. SELECTION CRITERIA

A committee of County representatives will review each submission and rate it using several evaluation criteria:

1. Responsiveness: The County will consider the material submitted by the proposer to determine whether the proposer is in compliance with the RFP.
2. Responsibility: The County will consider the material submitted by the proposer and other evidence it may obtain to determine the firm's demonstrated ability to market and negotiate a transaction for the disposition of a long-term care facility.
3. The qualifications, experience and familiarity with local government risk management issues.
4. Satisfactory local government experience and references.
5. The fee proposal for providing the requested services.
6. The availability of other related support services.
7. Any other information provided that the County deems valuable.

VI. BACKGROUND INFORMATION

The County of Fulton has a population of 33,609 according to the 2020 U.S. Census. The County is comprised of villages and rural communities, each with their own unique charm and appeal.

Since 1823, the people of Fulton County have supported facilities to provide social services for the elderly and indigent. Today, the County operates an approximately 14,800 square foot long-term care and rehabilitation facility located in Cuba, Illinois, on county-owned property. The current facility was constructed in 1969. It has 41 residents as of May 2023, and is configured to serve up to 49 patients with a maximum certification of 49 Medicare/Medicaid-eligible beds. The facility offers outpatient therapy and long-term care services. The Clayberg employs approximately 57 employees.

Over the past several years, the County has experienced financial and management challenges associated with the operation of the nursing home. The County lacks the financial and management capacity to continue operating the home in its current model and will be seeking qualified operators of long-term facilities to submit proposals for disposition of the home. Prospective entities to take over the home includes but are not limited to, for-profit, not-for-profit and/or consortia. A successful proposer to the request for proposal will be expected to seek alternatives within these categories or others with the intent to continue the mission of service offered by the home to the residents of the community.

VII. SCOPE OF SERVICES DESIRED

The County of Fulton desires the following services:

1. Collection of necessary data and information for potential buyers.
2. Development of marketing collateral that accurately describes the home and property to potential buyers. Said collateral shall include but is not limited to the following information:
 - a. Pricing and financial analysis information;
 - b. Property description;
 - c. A listing of recent comparable sales of nursing homes;
 - d. A market survey of competitive properties showing resident rates by payer category (i.e., private pay, Medicaid, Medicare, VA, etc.); and
 - e. Demographic information relevant to the nursing home
3. Develop strategies in cooperation with the County Board for the sale or transfer or other disposition of the subject property and business to a for-profit, not-for-profit, consortium or other qualified entity. Strategies shall include a proposed timeline with milestones indicated to provide guidance for operational considerations of the nursing home.
4. Solicitation of proposals that meet the qualifications as established by the County in consultation with the broker.
5. Qualification of bidders submitting proposals for the offering of the subject property and business.
6. Evaluation of submissions in accordance with criteria established by the County in consultation with the broker.
7. Negotiation of the transaction, including all necessary communication and coordination with the Fulton County Board Office and Health Committee.
8. Provision to the County of market data that will support the decision-making process with respect to the disposition of Clayberg. This may include presentation at public meetings of the County Board or other venues.

9. Provide all necessary assistance in closing the transaction upon approval of the County Board.
10. Handling all other customary activities and services associated with long-term care or rehab facilities real estate transactions, including consultation with County officials and staff.

VIII. PROPOSAL FORMAT

1. The proposal must be presented in the order as described below. To be considered substantive, the proposal must respond to all requirements of this part of the RFP. Any other information thought to be relevant, but not applicable to the enumerated categories, should be provided as an appendix to the proposal.
2. Provide a brief company history and description including size and number of employees.
3. A response to each item as set forth in the "Scope of Services Desired" in Section VII and a description of how your firm will approach delivery of those services.
4. Resumes of all principals that would be assigned to provide services to Fulton County.
5. At least three references (preferable from Illinois) from current public sector clients, including contact names, addresses and telephone numbers.
6. Information on the firm's experience in marketing and executing transactions of long-term care facilities similar to Clayberg.
7. A draft contract including the proposal for fees to be charged to Fulton County for provision of services requested.
8. A description of any other services to be provided without additional compensation beyond negotiated fee to be paid by the County for services provided pursuant to the terms of the RFP.
9. An explanation of what distinguishes the services the submitting firm can provide from other firms.

10. Responses to the following interrogatories:

- a. How many transaction (sales, transfers etc.) for any long-term care and/or rehabilitation facilities have you completed or been involved with in the last three years? In firm's history?
- b. Have you worked with facilities that have significant Medicaid patient census (>40%)? If so, please provide details.
- c. Please discuss in detail any transactions or experience you have had in working with not-for-profit or public entities to market or close a sale or transfer transaction of a nursing home.

IX. TIMELINE

May 31	RFP Issued
June 23	Submission deadline
June 29	Public Opening
July 5	Review by the Committee/Selection of Finalists
July 13	Presentation and recommendation to the County Board
OPEN	Contract approved by the County Board